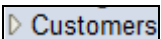






PS01.2 - Navigating in PeopleSoft

Step	Action
1.	<p>After signing into the system, your homepage is displayed.</p> <p>The homepage includes a Menu of applications and tools. You may access these by left clicking on them.</p> <p>NOTE: Your homepage will differ from the one presented here. Each person's menu is determined by the applications they need to perform their work at the City of Albuquerque.</p>
2.	<p>The Personalize menu at the top of the page includes two hyperlinks - Content and Layout.</p> <p>Content and Layout are advanced features and will not be demonstrated in this lesson.</p>
3.	<p>You may use these three icons to customize the look of your homepage.</p> <p>The icons are:</p> <ul style="list-style-type: none">* Refresh Menu* Minimize Menu* Close Menu <p>In this lesson, we will not select these options.</p>
4.	<p>In the upper right portion of the screen, there are six hyperlinks. These links appear on pages throughout the PeopleSoft system.</p> <p>Below is a description of each of the links.</p> <ul style="list-style-type: none">* Home - Returns you to this page (the homepage).* Worklist - Takes you to your personal Worklist page (related to PeopleSoft workflow).* MultiChannel Console - An advanced feature that the City of Albuquerque is not using.* Add to Favorites - Adds the current page to your My Favorites menu. Use this for pages you use frequently.* Sign out - Signs you out of the PeopleSoft system.* Help - Sends you to PeopleBooks (an online reference). Clicking Help opens a new window.
5.	<p>In this lesson, we will open the Customers link to display other navigation items.</p>
6.	<p>Click the Customers link.</p> 



Step	Action
7.	<p>The Customers page is displayed.</p> <p>Notice that the main part of the page includes links to folders and the contents of the folders.</p> <p>For example, under the Customer Information folder are four links:</p> <ul style="list-style-type: none"> * Quick Customer Create * General Information * Dun & Bradstreet * 7 More... (this means that there are additional links within this one) <p>To access you</p>
8.	<p>Click the Customer Information link.</p> <p>Customer Information</p>
9.	<p>The Customer Information page is displayed.</p> <p>Notice that the links on the previous page (Quick Customer Create, etc.) are now in the main part of the page.</p>
10.	<p>Notice that there are "breadcrumbs" for the pages you have navigated to get to this page - in this case, Main Menu and Customers.</p> <p>You may click on any of the breadcrumbs to return to that particular page.</p>
11.	<p>Click the General Information link.</p> <p>General Information</p>
12.	<p>The General Information page for Customer Information is displayed.</p> <p>This page is typical of search pages throughout PeopleSoft. Use this page to narrow your search for the appropriate record (in this case, the appropriate Customer).</p> <p>In this lesson, we will search for all Customers with the default (pre-populated) criteria.</p>
13.	<p>Click the Search button.</p> <p>Search</p>
14.	<p>Search results are displayed at the bottom of the page. The search results include all of the records that meet the criteria set above.</p> <p>In this lesson, we will select one of the Customer records.</p>
15.	<p>Click the ACTION link.</p> <p>ACTION</p>



Step	Action
16.	<p>The selected Customer's record is displayed.</p> <p>Notice that there are five tabs for this record - General Info, Bill To Options, Ship To Options, Sold To Options, and Miscellaneous General Info.</p> <p>This is typical of records in PeopleSoft.</p>
17.	<p>This page illustrates examples of several types of information and data entry in PeopleSoft. In the next few slides, we will illustrate each of them.</p>
18.	<p>The General Info Links is an example of a dropdown list.</p>
19.	<p>Click the General Info Links list.</p> 
20.	<p>You may select any of the items from the dropdown list.</p> <p>In this lesson, we will not select from the dropdown list.</p>
21.	<p>To close the dropdown list...</p> <p>Click the General Info Links list.</p> 
22.	<p>Another type of data entry field is a Date field.</p> <p>You may enter dates several ways. To enter July 1, 2013, you may type any of these into the Date field:</p> <ul style="list-style-type: none">* 070113* 07012013* 07/01/13* 07/01/2013* 7/1/13* 7/1/2013 <p>In addition, if the Date you wish to enter is today's date, you may type today or TODAY.</p>
23.	<p>You may also select a Date by clicking on the Calendar icon and selecting the appropriate date.</p> <p>In this lesson, we will not click on the Calendar icon.</p>
24.	<p>Another type of data entry field is a text field. The Name 1 field is an example of a text field.</p> <p>You may type within the text field, typically with mixed case letters, numbers, and special characters.</p> <p>NOTE: Some text fields are limited in length (10 characters, for example). Other text fields are limited to the type of letters, numbers, or characters you may enter.</p>



Step	Action
25.	<p>Another type of field is the checkbox.</p> <p>Checkboxes are on/off switches, activating or deactivating the specific field/function.</p> <p>Notice that the Bill To Customer checkbox is checked.</p>
26.	<p>Some pages include hyperlinks that lead you to other pages or functions.</p> <p>The Bill To Selection link is an example.</p>
27.	<p>Finally, many data entry fields allow you to either enter or search for the valid value.</p> <p>You may enter a valid value into the Team Code text box (CASA, for example) or click the search button (the "magnifying glass" to the right) to search for the valid value.</p>
28.	<p>Click the Home link.</p> <p>Home</p>
29.	<p>You have successfully reviewed basic navigation within the PeopleSoft system.</p> <p>End of Procedure.</p>